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**State of California**

**Department of Technology**

**Stage 1 Business Analysis**

**Technical Instructions for InfoPath®**

**July 2013**

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# Helpful Tips for Microsoft (MS) InfoPath® Form Users

Microsoft InfoPath® is a component of the Microsoft Office® Suite. InfoPath must be available and enabled on end user systems. Please contact your desktop support team to provide assistance if you are unable to open the Stage 1 Business Analysis form.

Unlike other file types in MS Office, InfoPath® forms are derived from a source template. In this case (Stage 1 Business Analysis), all forms are derived from a California Department of Technology (Department of Technology) template named “S1”, available from a link on the Department of Technology website.

- From the Forms page, click “Stage 1 Business Analysis (InfoPath)”. Keep the existing “S1” template name and save it in a location accessible to all that will be using the file, e.g. a common network drive. Please do not create an alternative template with a different name. This may cause subsequent reviewers and approvers to not be able to view the form.
- It is advisable that users create and use a shortcut to the template. This ensures that only a blank Filler Form is opened each time it is accessed.
- All users of the form, whether an author, reviewer, approver, or someone sending completed forms to the Department of Technology, need to have opened the template file at least once. Access to the template can be done from our website, or a copy of the template can be sent along with the files in an email. If a new recipient receives a group of files, they will need to open the template at least once before being able to successfully open any of the forms. Choosing “Save & Send; Send Form & Template” in the menus will accomplish this. (See *the following section*) Or, simply include a copy of the template file along with all the forms attached in an email when sending.
- Be aware that “InfoPath Editor Security Notice” commonly appears the first time the InfoPath® template is accessed. Generally, this will be a one-time notification due to the source template residing on a Department of Technology site.

File format to use:

- The preferred version is InfoPath® because that is immediately uploaded into the Department of Technology’s form library.
- Excel® also works, but requires additional Department of Technology steps to import.
- Please be aware that the MS Excel version is macro-enabled.

The InfoPath® form is in “.xml” format. Template files are “.xsn” format. Some organizations have restrictions on xml files. If this is encountered, you may want to talk to your desktop

support organization. Xml files may be allowed by your organization when bundled in a zipped file.

The Scorecard section at the end of the form may be expanded or collapsed. However, these fields are to be completed by the Department of Technology.

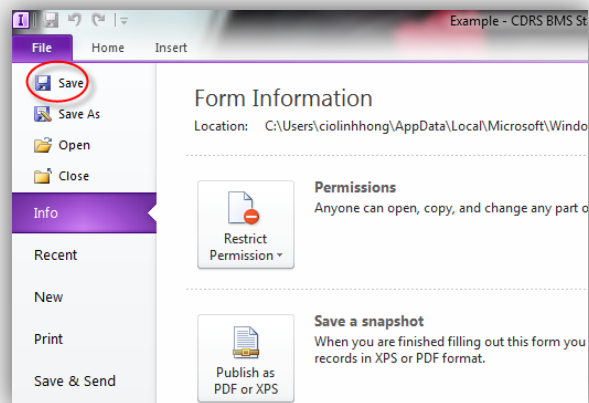
Please contact your [ITPOC Manager](#) if internal help cannot address an issue with accessing or using the form(s).

# Saving a Business Analysis

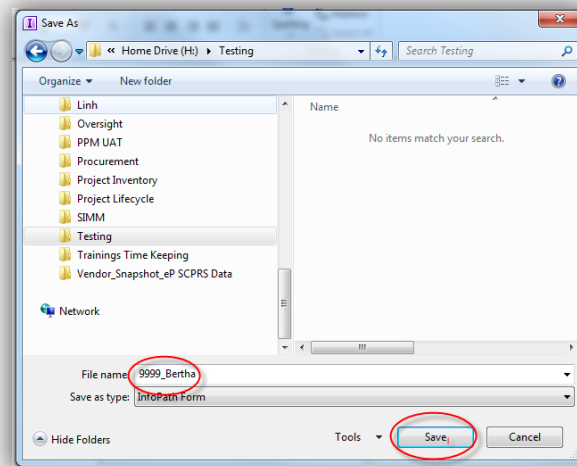
When each form is initiated or completed, save it by –

*Save file to a location on your computer:*

1. From the **File** menu select **Save**.



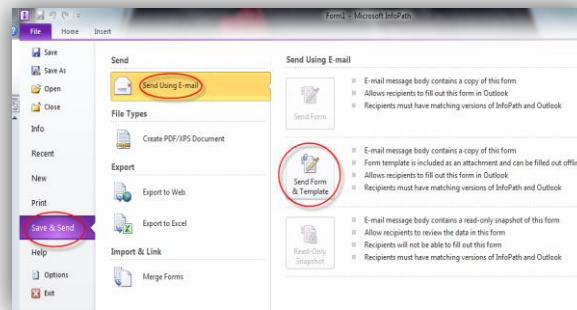
2. Name it with a unique filename. A recommended format would be "Org Code\_Shortname".
3. Select **Save**.



### *Sending a single form via email:*

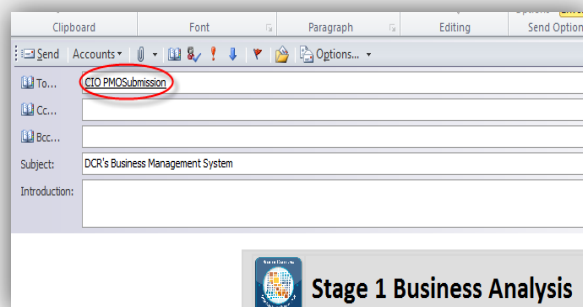
From the File menu –

1. Select **Save & Send**.
2. Click **Send Using E-mail**.
3. Click **Send Form & Template** button.



4. Address email to the recipient(s) and add the subject as appropriate. Final versions, with approvals will be sent to:  
*CIOPMOSubmission@state.ca.gov*

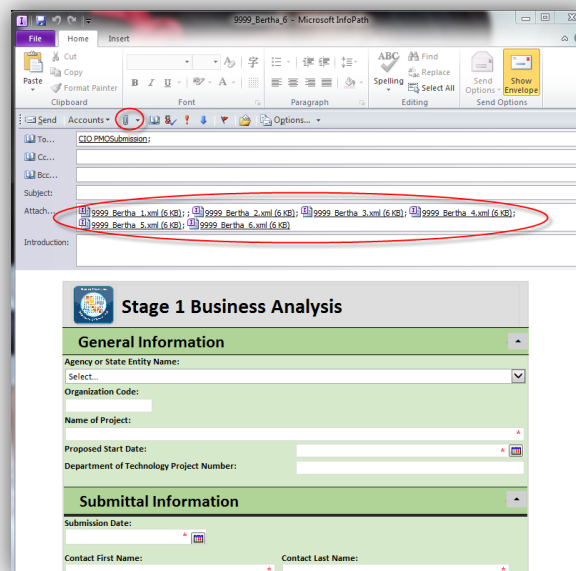
*(A snapshot of the form will show in the email body. This is only an image of the form, not a working version.)*



### *Sending multiple forms via email:*

5. After the four steps above - Use the Attach File dropdown to attach multiple XML files.
6. Click **Send**.

*(The initial form and template are also included in the email, despite not initially showing as attachments.)*



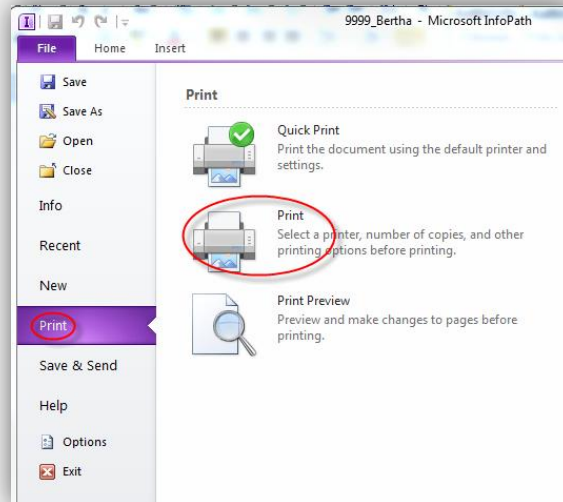
# Create a PDF Form Save and Print Version

Print completed form in PDF format

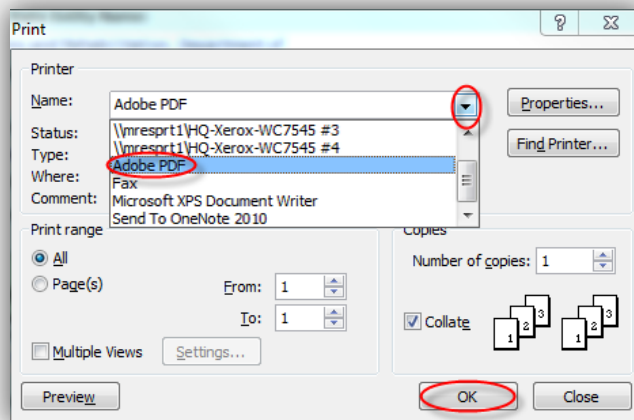
*Print file in PDF format:*

From File menu-

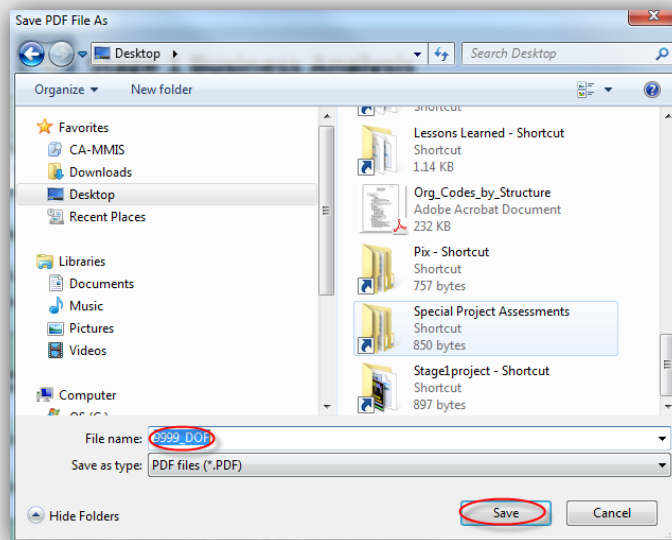
1. Select **Print**.
2. Click **Print**.



3. Select **Adobe PDF** on the dropdown menu
4. Click **OK**.



5. Name it with a unique filename. A recommended format would be the same "Org Code\_Shortname" used for the InfoPath® version.
6. Select **Save**.



A PDF file will automatically open

7. Click the **Print** icon.



8. Validate **Printer**
9. Click **Print**.

